Livelink

OPEN TEXT
CORPORATION

Livelink® 9.1 New Feature List

8 March 2002

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Livelink 9.1 New Feature List

Release 9.1 of Livelink, the leading collaborative knowledge management application from Open Text, includes a number of new features designed to enhance existing Livelink functionality and expand Livelink's scope by introducing new enterprise knowledge management capabilities.

The changes in Livelink 9.1 include:

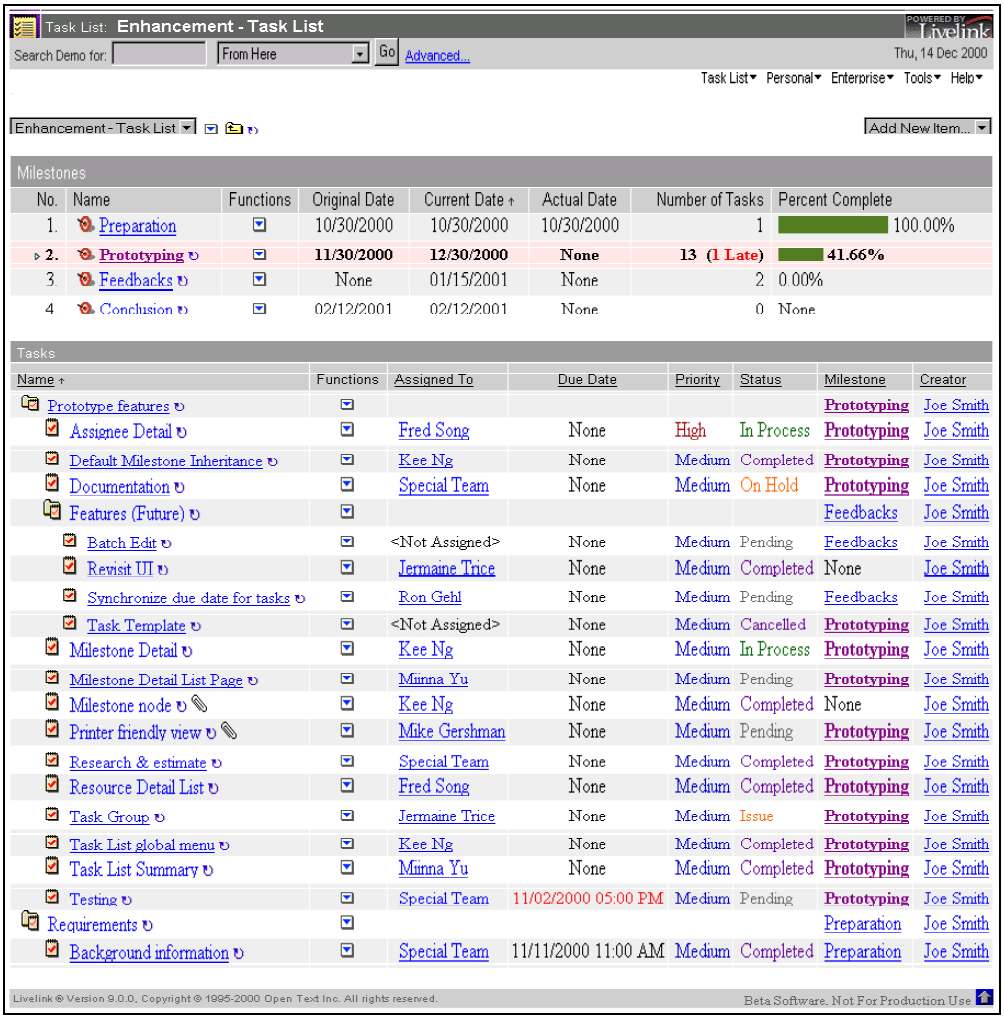
- New collaborative features, including enhanced tasks, polls, built-in text editor, and spell checker
- Ability to import objects into Livelink using XML
- Search enhancements, including:
    - Improved Search Result page
    - Ability to cluster results according to common themes, common authors, common locations, or common dates
    - Content-only or metadata-only searching
    - Hit-highlighting of summaries
    - Ability to create multiple global or personal search templates
    - "Find Similar" function on Function menu of all documents in Livelink
    - Support for Natural Language Queries (NLQ)
    - Enhancements to index administration, including full and incremental backup and recovery
- Ability to restore deleted documents
- Enhancements to Livelink Workflow
- Ability to use either Java or non-Java (HTML) menus in the Livelink interface
- Ability for users to define a personal profile that includes a photo, personal interests, favorite Web sites, and more
- Ability to use multiple user domains
- Livelink Atlas 1.0 (Web-based tree view of Livelink repository and favorites), which is a separately installable core module

New Features in the Livelink Core

New Collaborative Features

Enhanced Tasks

Livelink 9.1 includes a number of new tasks enhancements, as illustrated in the following image.



New Task List Workspace

Tasks in Livelink 9.1 have been enhanced with the following features:

- **New Milestone Object**—Milestones can be added to a Task List workspace to define a point in time at which one or more tasks should be completed. When tasks are created, they can be associated with a particular milestone. A progress bar is displayed for each Milestone indicating its percent completion and whether it is late.

- **New Task Group Container**—Within a Task List workspace, a Task Group container can be created to contain a group of related tasks. The Task Group is a more convenient way of grouping tasks than adding sub-tasks to a task, because it does not have status and other task metadata associated with it.
- **New Task Reports**—Task List workspaces now have a Task List menu that contains functions for displaying Summary, Detailed Milestone, and Detailed Resource reports.
- **Printer-Friendly View**—This is a new function on the Function menu of a Task. It displays the contents of a Task in an HTML page that is suitable for printing. This overcomes the problem whereby the contents of some fields were not completely displayed.
- **Multiple Item Editing**—A new function called Edit Items has been added to the Function menu of Task Lists, Task Groups, Tasks, and Milestones. It enables users to update the parameters of all of the items in the container simultaneously, such as the Assigned To, Due Date, Priority, Status, and Milestone parameters.

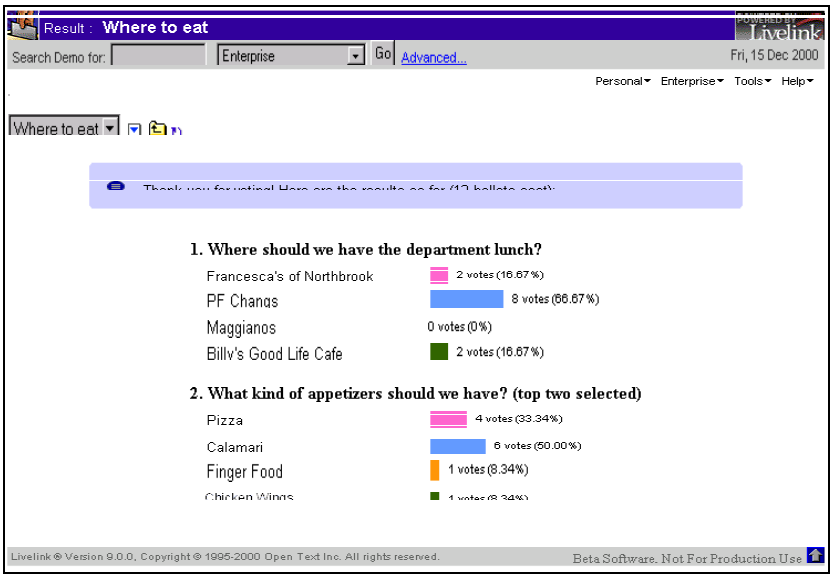
Polls

Livelink 9.1 includes the new "Poll" object. As the name suggests, a Poll allows you to conduct a survey to solicit the opinions of Livelink users on one or more issues.

The Poll object has the following characteristics:

- It can be added to any container where a user has sufficient permissions.
- It can be attached to a Task or a News article.
- Six levels of permissions apply to the Poll object, including See, See Contents, Modify, Edit Attributes, Delete, and Edit Permissions. The Modify permission is required to administer the Poll. The See and See Contents permissions are required to vote.
- Multiple questions can be added to a Poll. A particular question can have multiple preset responses, which are either mutually exclusive (radio buttons) or concurrent (check boxes).
- A given user can vote in a given Poll only once. After voting, the user sees the Poll result when viewing the Poll.
- A Poll is only available for voting between its "effective" and "expiration" dates/times. After a Poll expires, all users see the results page, whether they have voted or not
- An image can be added to the display of the Poll interface to enhance it.

The following image shows the Poll Result page.

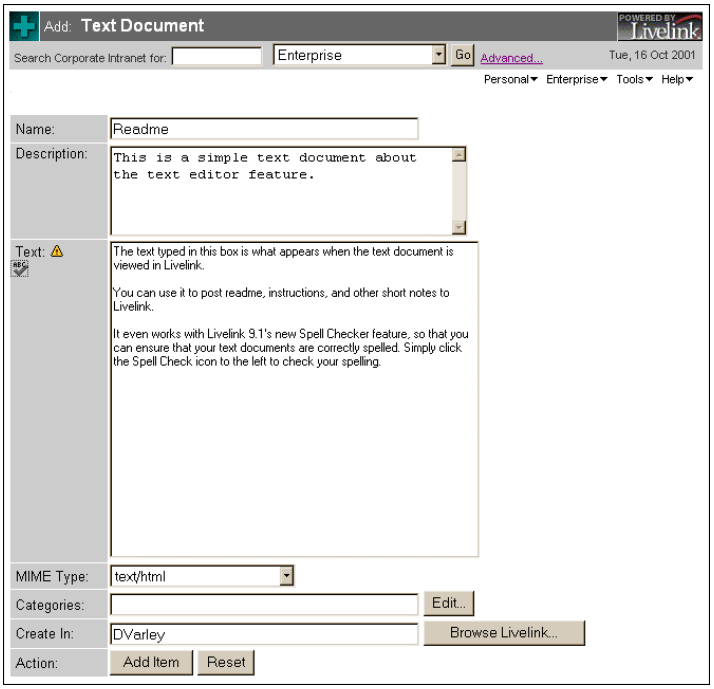


Livelink Poll Result

Text Editor

The Text Editor is a new function that allows Livelink users to compose and add a text document to Livelink in a single step. It is a convenient means of adding simple text documents to Livelink without having to first compose them in a separate interface.

The Text Editor is also integrated with the new Spell Check feature so that users can verify the spelling of the text documents that they have composed before adding them.



Livelink Text Editor

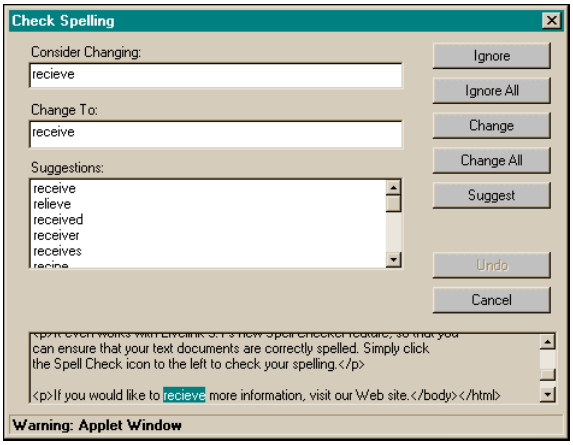
Spell Checker

Livelink 9.1 now includes a Spell Checker. English, French, and German spell checker dictionaries are available for the corresponding language versions of Livelink 9.1.

The Spell Checker can be applied to a number of fields in the Livelink forms that are used to add:

- Text documents
- News articles
- Discussion topics and replies
- and other published content fields

If the Spell Check function is available for a particular field, it is indicated by the Spell Check icon ( ) next to the field. When clicked, the icon opens a dialog box that prompts the user to review words that are not in the dictionary and proposes alternatives.



Livelink Spell Checker Dialog Box

XML Import and Export

Prior to the release of Livelink 9.1, Livelink 9.0 already included strong support for XML, including:

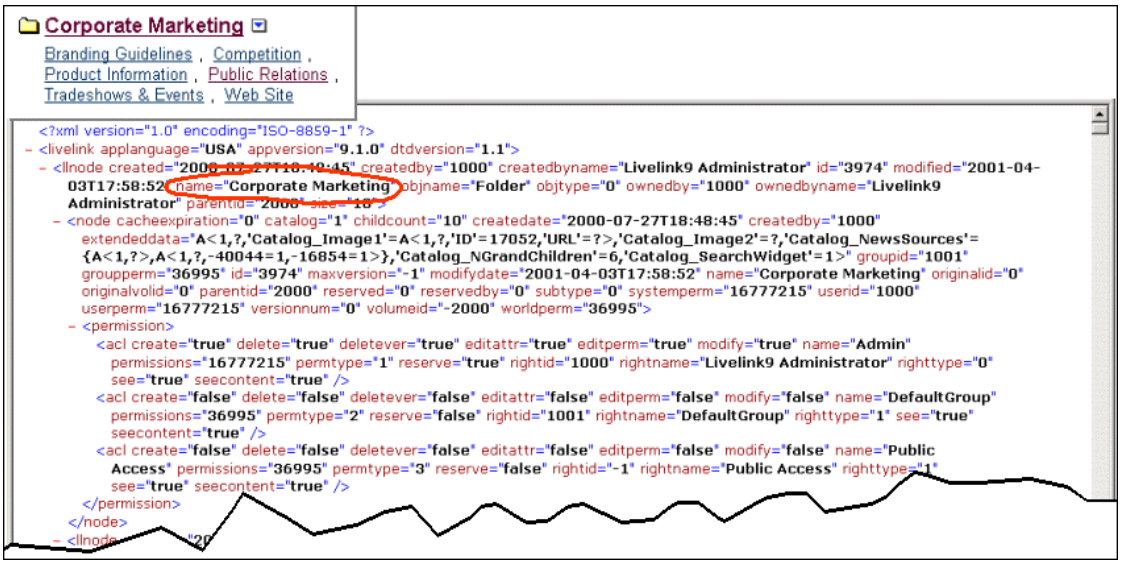
- A built-in XML parser and XSLT engine
- Native indexing and searching of XML documents stored in Livelink
- Native indexing and searching of XML documents in external data sources
- An XML Workflow Interchange Step for exchanging information with external processes during the running of a workflow
- The ability to export all of the information (content and metadata) associated with any Livelink object as an XML document

Livelink 9.1 builds on this support for XML by adding the ability to import objects into Livelink using XML. Using the XML Import feature, an XML Document conforming to the Livelink DTD can be imported to create the objects described in the document. For example, this feature can be used to import an entire folder hierarchy into Livelink from an XML document that describes its contents.

Livelink 9.1 also includes improvements to the XML Export feature, including the ability to follow Alias links in a container being exported and to control the depth of the export to a level of a hierarchy other than one or all.

The following image illustrates the XML document that is generated by the export of the "Corporate Marketing" folder. This is done by appending the following command to the Livelink URL in the browser:

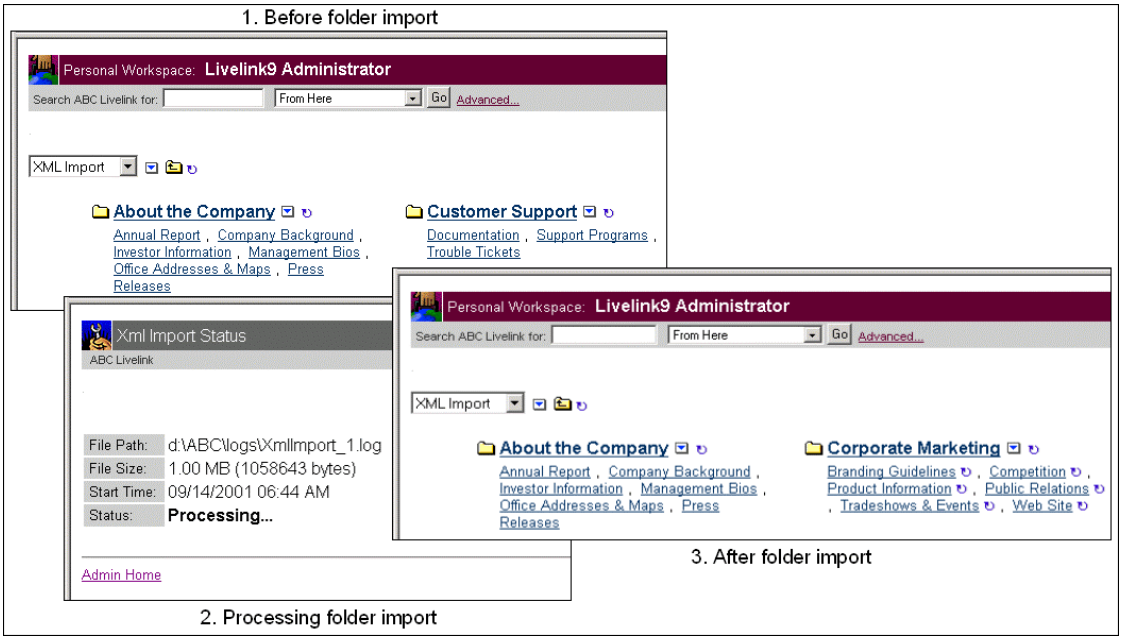
objAction=XMLexport&content&attributeinfo&nodeinfo&versioninfo=all&scope=sub



File Generated by XML Export of Livelink Folder

The XML file shown above can then be imported into another Livelink database. This is done by appending the following command to the Livelink URL in the browser:

objAction=admin.XMLimport&objid=106601&filename=d:\temp\CorpMarketing.xml



XML Import of "Corporate Marketing" Folder

Livelink Search Improvements

Livelink 9.1 includes a number of major improvements to search features, usability, and performance, including:

- Search Result Page Improvements
- Content/Metadata-Only Searching
- Summary Hit-Highlighting
- Multiple Search Templates
- Result Themes
- Find Similar Function
- Natural Language Querying
- Index Administration Improvements

These improvements are described in subsequent sections.

Search Result Page Improvements

The layout of the Search Result page has been improved and now includes a theme panel that enables users to refine the results according to common authors, common dates, common locations, and common topics.

New Livelink Results Page

Result Themes

On the Search Results page, a left panel (shown above) displays the common themes, such as common authors, common dates, common topics, and common locations, that have been discovered by the Livelink search engine.

Users can select the check box of one or more themes to refine the results according to those themes.

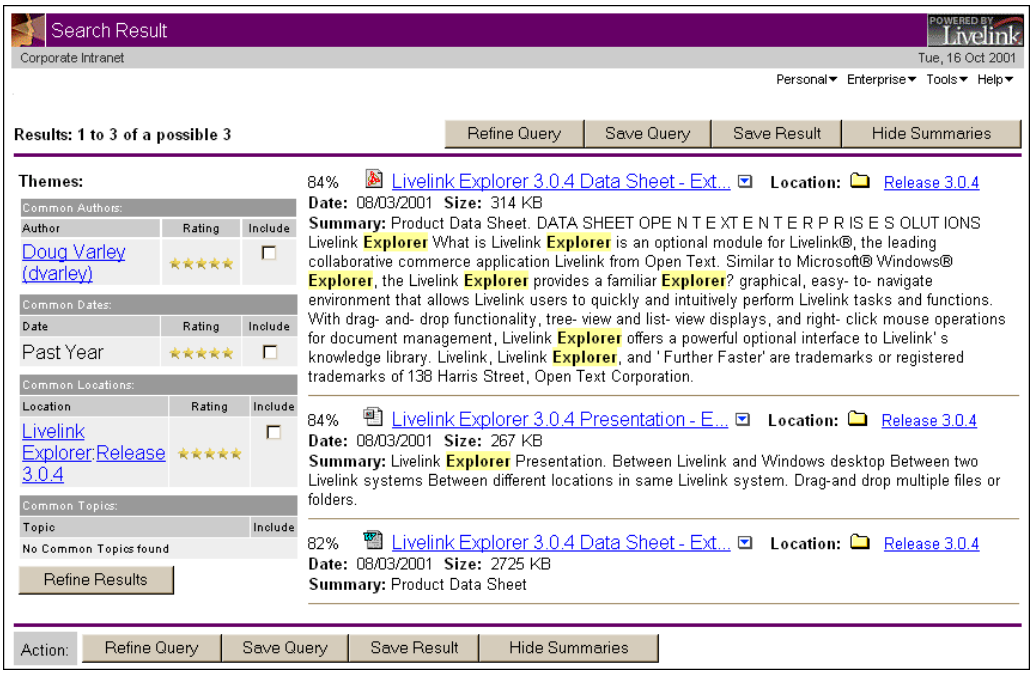
The Livelink administrator controls whether the result theme feature is enabled, which types of themes are displayed, and the number of themes displayed per type.

Content/Metadata-Only Searching

Livelink users can now more easily search for terms only in the content of a document or conversely only within the metadata of a document object.

Summary Hit-Highlighting

Search terms are now highlighted in the summaries that appear directly on the Search Results page. This feature complements the Hit Highlight function (available on the Functions menu) that highlights all of the hits in an entire document.

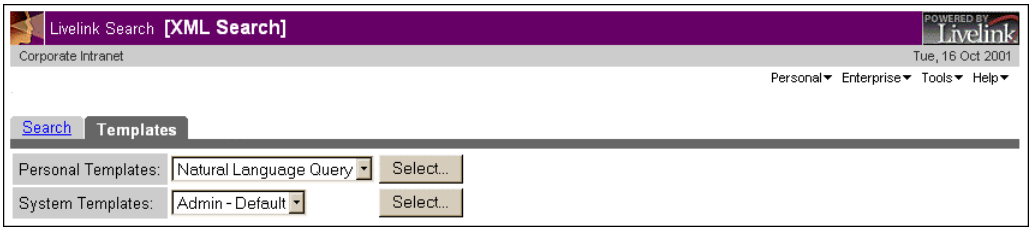


Search Result Page Showing Summary Hit Highlighting

Multiple Search Templates

Users can configure the Advanced Search page directly in their Web browsers by using the buttons provided to add and remove search criteria. After a user has configured the Advanced Search page according to his or her preference, the configuration can be saved as a "search template". In previous versions of Livelink, the Livelink administrator was able to define one global default search template and each individual user was able to define one personal search template.

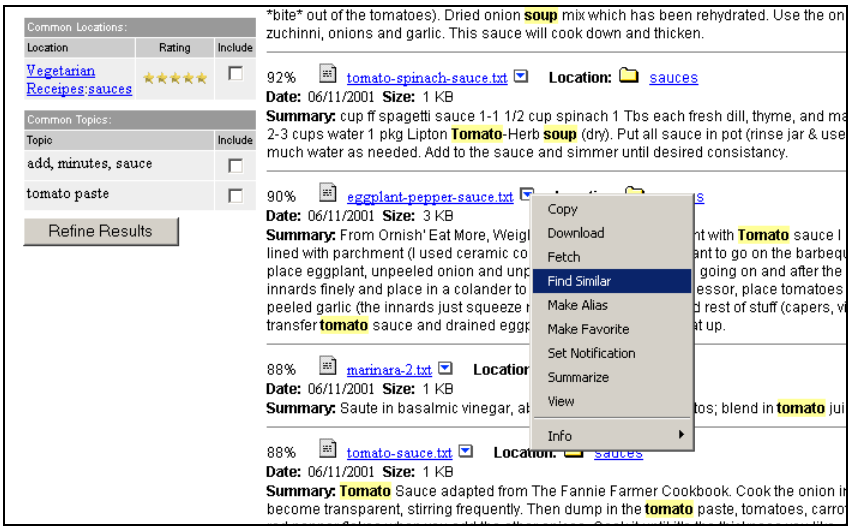
Livelink 9.1 enables the Livelink administrator to create multiple global search templates and enables users to create multiple personal search templates, each with a unique name.



Templates Tab for Selecting Personal or System Search Templates

Find Similar Function

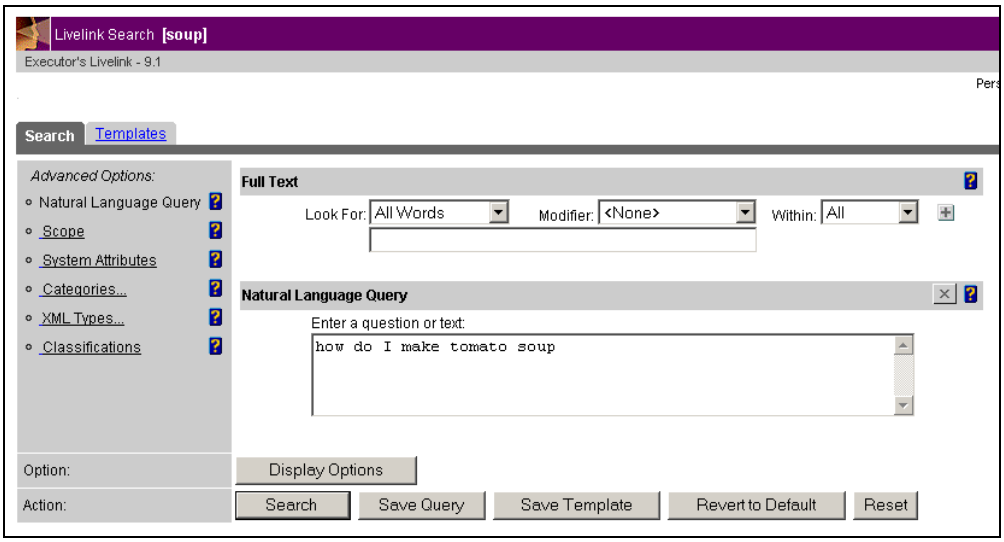
Find Similar is a new function on the Function menu of every document object in Livelink, no matter what its location. It enables users to search for documents that are similar in content to the document upon which the function is run.



Find Similar Function for Documents in Livelink

Natural Language Querying

Natural Language Querying is now available in Livelink 9.1. A natural language query is query phrased in the same way in which a human would pose a question to another human. For example, to find information about making tomato soup using a full text search, you might enter the terms “tomato soup recipes” in the search form. Using natural language querying, you could enter the question, “How do I make tomato soup?”

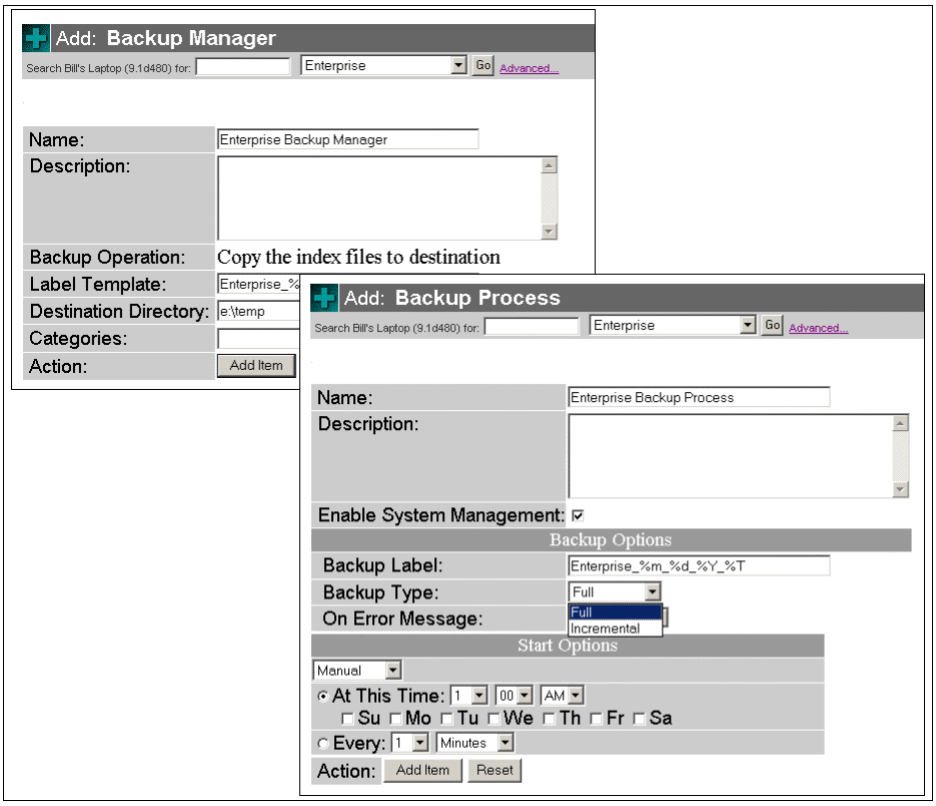


Natural Language Query Form

Index Administration Improvements

A number of improvements to search and index administration have been made in Livelink 9.1, including full and incremental backup and recovery of Livelink indexes.

The new index backup and recovery capabilities are based on a new object type called a “Backup Manager” that the Livelink administrator creates in the System Volume folder. A “Backup Manager” is a container that contains one or more “Backup Process” objects. The Backup Manager defines the file system location of the backup files. A Backup Process defines the type of backup (full or incremental) and the backup schedule.



Adding an Index Backup Manager and Process

Document Undelete

Livelink 9.1 includes the Document Undelete feature. If a document or a container that includes documents is inadvertently deleted, the Livelink Administrator can recover the documents.

Livelink Workflow Enhancements

In addition to the many workflow changes that were introduced in Livelink 9.0, Livelink 9.1 adds improved presentation and navigation of Workflow Status and Workflow Assignment pages.

Configurable Menu Style

In Livelink 9.1, administrators now have the option of setting the menu style for the Livelink Web interface according to the preference of their organization and users. The menu styles available are Java and HTML (drop-down lists). The administrator sets the default global menu style. If desired, the administrator can also give users the option of selecting their personal menu style preference.

Livelink Interface with Non-Java HTML Menus

Personal User Profiles

The standard information page for Livelink users now contains additional fields that can be specified by the Livelink administrator or populated from a user directory service. These new fields include Phone, Fax, Office Location, and Time Zone (the Phone and Fax fields replace the old Contact field).

In addition to the system user data, individual users can enhance their personal profile by providing extra information such as Gender, Birthday, Alternative Email, Home Address, Home Phone, Home Fax, Cellular Phone, Pager, My Homepage, My Favorite Links, and Interests. It is also possible for a user to upload a photo to be displayed on their personal profile page. Livelink users are able to browse the personal profiles of other users to learn more about them.

User-Defined Personal Profile

User Domains

Livelink 9.1 now supports multiple user domains in its internal user directory. When users log in under their Livelink domain, they view the Enterprise Workspace of that particular domain. In addition, a new group type called “cross-domain group” has been created to enable multiple users from different domains to be added to the same group. Domain users can access projects in other domains via the Projects item on their Personal menu.

Livelink Atlas

Livelink Atlas is a separately installable core module adds a Windows Explorer-like navigation panel to the Livelink interface, allowing users to quickly navigate to other areas of the Livelink hierarchy. The Livelink Atlas panel can also be detached as a separate window that can be used as a "remote control".

Livelink with Livelink Atlas Navigation Panel

New and Updated Livelink Optional Modules

New Optional Modules

The following new optional modules, which are described in subsequent sections, have recently been released by Open Text:

- Livelink Archive for SAP® R/3®
- Livelink Classifications
- Livelink MeetingZone
- Livelink Records Management
- Livelink Wireless
- Livelink WebDAV

Livelink Archive for SAP R/3

Livelink Archive for SAP R/3 is a complementary solution for customers who have both SAP R/3 and Livelink. Certified by SAP, it is based on SAP's ArchiveLink® interface, which is designed to link SAP applications to external storage systems such as optical archives and document management systems. Livelink Archive for SAP R/3 enables Livelink to be used as the archive for SAP R/3 documents.

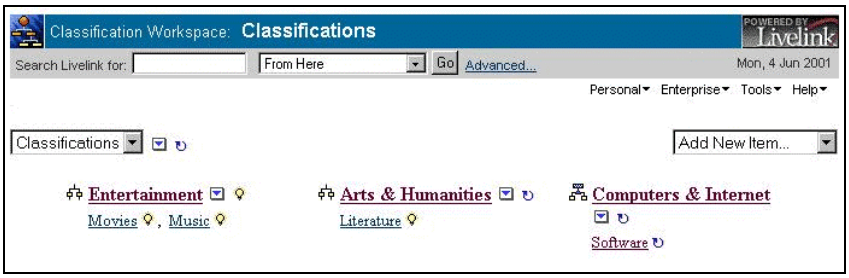
Using Livelink Archive for SAP R/3, SAP users can view external documents and archived SAP data such as reports from within SAP R/3 without having to access Livelink separately. The data component of SAP documents stored in Livelink is accessible from the standard Livelink Web interface for browsing and searching.

For more information about Livelink Archive for SAP R/3, visit our Web site: http://www.opentext.com/livelink/modules/modules.asp?id=1026&categoryID=1018

Livelink Classifications

Livelink Classifications enables users to manually associate Livelink objects with one or more taxonomical classifications. Classification objects can be created in the Classification Workspace to define a taxonomical hierarchy such as Entertainment > Movies > Foreign, and so on. Users can use classifications to categorize and browse information according to alternative conceptual themes rather than according to the folder hierarchy.

Livelink Classifications adds a "Classification" tab to Livelink objects, such as documents, folders, and compound documents. The Livelink administrator can select the object types for which the Classification tab is enabled. The Classification tab is used to associate the object with one or more of the classification objects created in the Classification Workspace.

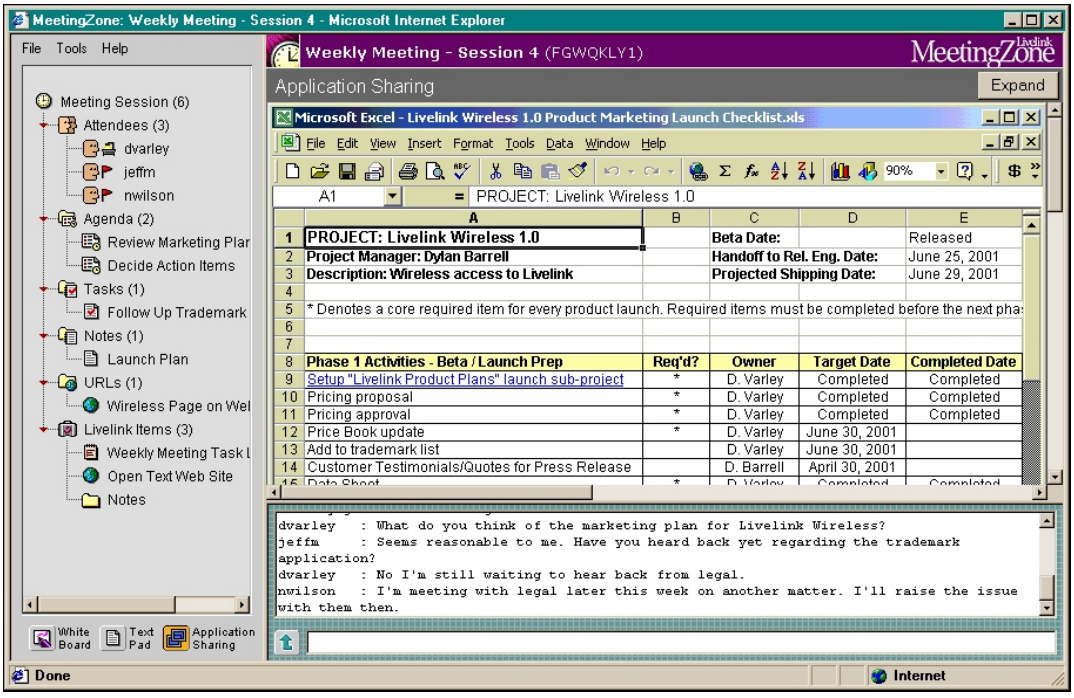


Classification Workspace in Livelink

Livelink MeetingZone

Livelink MeetingZone adds real-time collaboration capabilities to Livelink. It enables members of geographically dispersed teams to attend real-time virtual Web meetings, regardless of their location. Livelink users can set up and attend Livelink MeetingZone meetings quickly and easily in the Livelink interface using a standard Web browser. Even external, non-Livelink users can be invited to meetings.

The Livelink MeetingZone virtual meeting interface provides attendees with one-click access to their enterprise knowledge base in Livelink, enabling the viewing and revision of project-related items during a meeting. During a meeting session, attendees can view applications shared by the presenter, conduct group chats, have private conversations, use the whiteboard tool, view links to Livelink items, and create and view agenda items, notes, tasks, and Web links. When the meeting ends, all of this information, including a meeting summary, is captured in Livelink, thereby becoming a permanent part of an organization's knowledge capital and providing benefits long after the meeting is over.



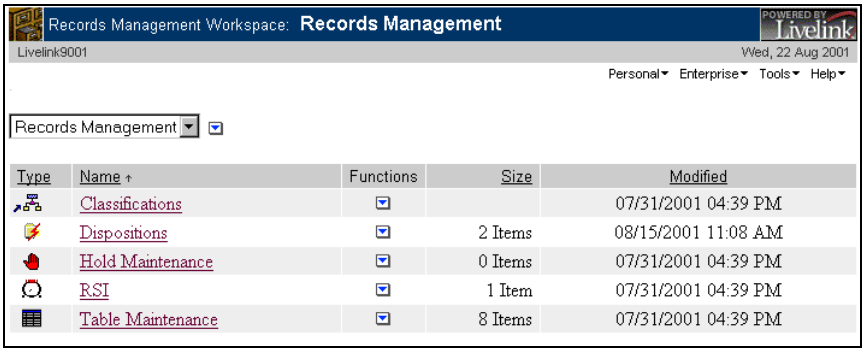
Livelink MeetingZone Virtual Web Meeting Interface

For more information about Livelink MeetingZone, please visit our Web site: www.opentext.com/meetingzone

Livelink Records Management

Livelink Records Management adds records management functions and capabilities to Livelink. Livelink Records Management provides customers with lifecycle management of all corporate electronic records, as well as of physical objects. It empowers everyone in an organization to file all corporate holdings in a structured manner, thus reducing the risks associated with audit and litigation.

The Livelink Records Management interface is integrated into Livelink's familiar Web-based interface, giving both users and administrators access to records management functions from a Web browser.



Livelink Records Management Workspace

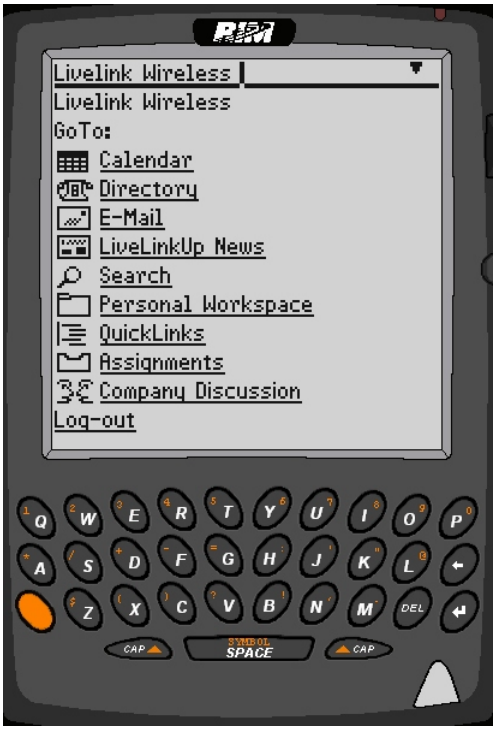
For more information about Livelink Records Management, please visit our Web site: http://www.opentext.com/livelink/modules/modules.asp?id=1009&categoryID=1014

Livelink Wireless

Livelink Wireless is a solution for mobile users. Livelink Wireless provides users with the ability to perform a variety of Livelink operations directly from a wireless device, including the ability to complete a task, check e-mail, e-mail a document, compose a text message, participate in a discussion, or set up an appointment in Livelink OnTime®.

Livelink Wireless supports Web-enabled WAP (Wireless Access Protocol) and iMode mobile telephones, PalmOS® devices, RIM BlackBerry™ pagers, or Pocket PCs.

Livelink Wireless enables users to personalize Livelink Wireless menu items in the order that they prefer, set up shortcuts to favorite Livelink items, and even store personal contact files in Livelink for one-touch dialing and e-mailing from wireless devices.



Accessing Livelink from a Wireless Device

For more information about Livelink Wireless, visit out Web site: www.opentext.com/wireless

Livelink WebDAV

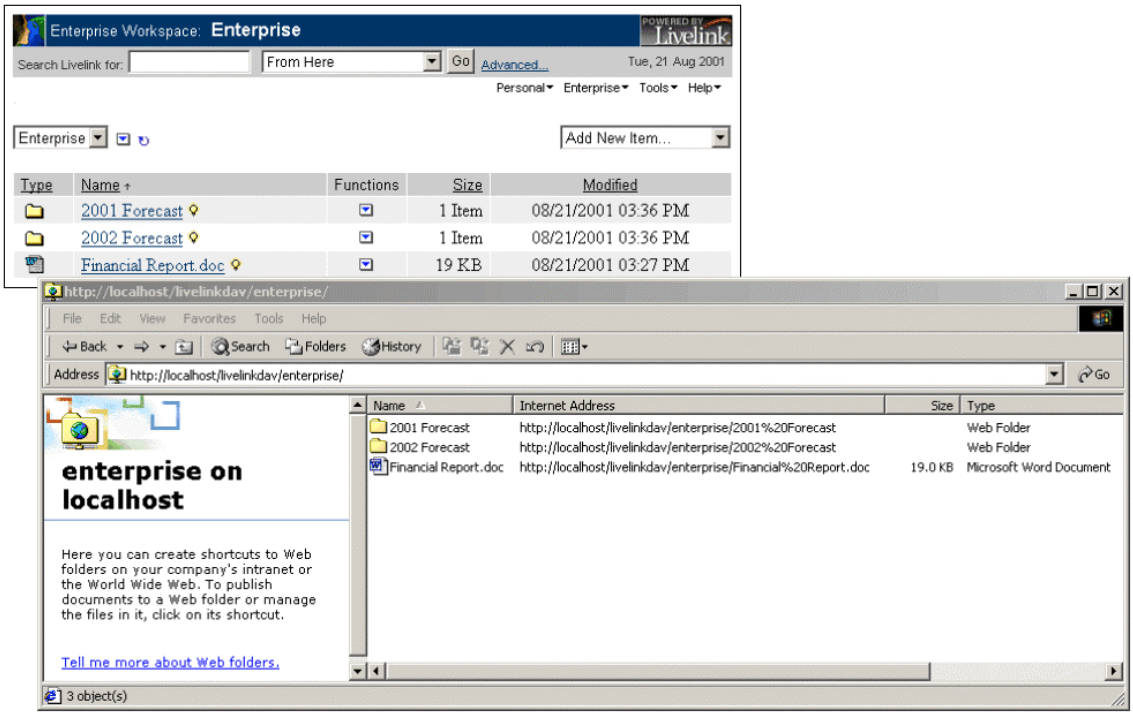
Livelink WebDAV adds support for the WebDAV protocol to Livelink. WebDAV is an acronym that stands for "Web-based Distributed Authoring and Versioning." It is a set of extensions to the HTTP protocol that allows users to collaboratively edit and manage files on remote Web servers.

WebDAV allows users of WebDAV-compliant software clients or operating systems to interact with WebDAV-compliant servers, providing them with the ability to:

- Create folders and documents
- Move, copy, and delete folders and documents
- Lock (check-out) documents
- View the contents of a folder or folder hierarchy

By making the Livelink server WebDAV-compliant, Livelink WebDAV makes it possible for users of WebDAV-compliant applications and operating systems to perform the above operations directly in the Livelink repository. Microsoft®, IBM®, Oracle®, Apple® and Adobe have released or announced products that support WebDAV in some way. For example, Microsoft's webFolders™ and Office® provide an integration with WebDAV servers, allowing basic creation, modification and manipulation of documents and

folders on a WebDAV server. Other applications provide further support, such as Acrobat® Exchange®, which enables the markup on PDF files via a WebDAV server irrespective of where the PDF file resides.



Livelink Content Viewed through Microsoft webFolders Using WebDAV

Even though the functionality that Livelink WebDAV provides overlaps with functionality offered by Livelink clients such as Livelink Explorer and Livelink Desktop, these Livelink clients offer much richer functionality than the basic document management capabilities supported by WebDAV. For example, WebDAV does not currently support categories or mandatory attributes, it does not support objects other than documents and folders in an interoperable way, and it has no mechanism for interchanging between the client and Web interfaces. As a standard, it lacks the functionality that differentiates one system from another. Livelink clients such as Livelink Explorer and Livelink Desktop will continue to be a necessary for users who require more than the basic document management functionality that WebDAV supports.

For more information about Livelink WebDAV, visit our Web site:
http://www.opentext.com/livelink/modules/modules.asp?id=1028&categoryID=1011

Updated Optional Modules

The following modules have been updated to support new features in Livelink 9.1:

- Livelink Activator™ for CORBA Developer Kit
- Livelink Activator for Lotus Notes
- Livelink Desktop
- Livelink Directory Services
- Livelink Explorer

In addition to being updated to support Livelink 9.1, the following modules include new features that are described in subsequent sections:

- Livelink Brokered Search
- Livelink OnTime
- Livelink Personal Knowledge Discovery
- Livelink SDK

Livelink Brokered Search

Livelink Brokered Search allows users to enter a query once in a common interface and have the query submitted to several search engines, including Livelink search, public search engines, and authenticated search engines. It then aggregates the results from the different search engines into a single result page.

Livelink Brokered Search 1.0 was introduced as a component of myLivelink 9.0. The release 1.0 interface was a part of the myLivelink interface.

The latest release of Livelink Brokered Search, version 1.5, still requires the myLivelink 9.0 server, but offers an independent interface.

For more information about Livelink Brokered Search, visit our Web site:
http://www.opentext.com/livelink/modules/modules.asp?id=1029&categoryID=1013

Livelink OnTime

Livelink OnTime adds personal and group calendaring to Livelink.

The latest release of Livelink OnTime, version 5.0, includes the following feature enhancements:

- Users can now invite an entire Livelink group to an appointment, rather than invite attendees one by one.
- It is now possible to attach Livelink objects, such as documents and folders, to an appointment object.
- Users now have the option of receiving appointment alarm messages via e-mail in addition to the popup alarm dialog box.

In addition, the OnTime server has been enhanced to improve performance and scalability.

For more information about Livelink OnTime, visit our Web site: http://www.opentext.com/livelink/modules/modules.asp?id=1013&categoryID=1011

Livelink Personal Knowledge Discovery

Livelink Personal Knowledge Discovery is a package offering that combines the power of query-based knowledge discovery with personal Web crawling.

Livelink users can specify Web sites of interest that they want crawled and indexed. Livelink's Web crawling technology then consolidates the personal crawling requests to ensure that each site is only crawled once.

Users can then set up queries that monitor the information being retrieved by the crawling engine for content of interest. If a Web page is discovered that matches the user's interest as defined in a query, the link of the page is added to the result list and the user receives e-mail notification that a new page with content of interest has been discovered.

Livelink Personal Knowledge Discovery allows users to automate research of multiple knowledge sources and filters the information to pinpoint content that is of interest to users in their roles. Knowledge workers are aware of and can act upon new information in record time, improving efficiency, responsiveness, and time to market.

Livelink SDK

The Livelink Software Development Kit (SDK) includes the Livelink Application Programming Interface (API) and the Livelink Builder development environment.

The Livelink API and the Livelink Builder have both been updated to support the new features in Livelink 9.1

In addition, when the Livelink Builder is installed, its accompanying online documentation is automatically indexed for convenient searching by developers.

For additional information, please contact:

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